**COACHING OVERVIEW**

As part of our Progressive Discipline Process we are committed to giving you as much clarity and coaching as possible in order to help you succeed. It is our goal to be exceedingly clear and to do everything in our power to work with you to build a long term and successful career at Silver Lining!.

**PROGRESSIVE DISCIPLINE STAGES**

* **Manager Day to Day Support & Feedback to Help You Learn & Grow** xxx.
* **Verbal Warning & Coaching**  **This overview and this meeting are the official notice that we are giving you a verbal warning around the performance issues that we are seeing and we are committed to giving you the coaching and support you might need to turn these around and succeed.**
* **Written Warning 1 / 2 / 3** in the event that we do not make the necessary progress on the items that are noted below and that we agree on as next steps a Written Warning would be the next official step in the process
* **Termination** is the very last resort and it is our goal that we will not reach this step!

**VERBAL WARNING & COACHING MOMENT FOR**

* **Team Member:**
* **Manager:**
* **People Team Present:**

**PROFESSIONAL STANDARDS ASSESSMENT**

|  |  |  |  |
| --- | --- | --- | --- |
| **Professional Standard** | **Current** | **Min Goal** | **Specific Feedback** |
| Clear **passion for small business** that drives your day to day behaviour - you care about small business and that is why you are at Silver Lining. It drives you to work hard and do good. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Connection with our SLAPsters** that makes our business real to you. What we do is not just about data or a job, it is about these real people. You know them, you care about them, you connect with them and that connection informs your work. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Connection with our brand / mission / voice** that drives everything you do. Every document you create, every idea you come up with, every suggestion you make is being done from the point of view of who we are and is in alignment with that. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Commitment to excellence** is high and every document you create, every email you send, every deadline you commit to, every commitment you make is done with a high degree of professionalism and excellence. You present work to your manager in a “client ready” format and pay attention to the details that matter. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Hustle** is your middle name. You are scrappy. You ask HOW, not IF. You figure things out. You come up with big ideas - and then you make them happen. You call whoever you need to call. You ask questions, you get answers. You make $h%t happen! | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| You **Work Hard.**  You show up on time for work, you stay disciplined and get your work done. You meet deadlines and you do what you say you will. You are on Podio and responsive. You show up. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| Things go wrong every day - but you are **Resourceful** - so you figure out how to fix them. Need a new website? You figure out how to build one. Can’t figure engagement out? You read a book or take a course to try to get new inspiration. Trouble achieving results? You try 5 new things - and you keep trying new things until you figure out what works. You just figure it out. | **LOW**  **AVG**  **HIGH** | **HIGH** |  |
| **Connection with Team** is strong. You use Podio and Zoom to stay connected with the Team. Although we are virtual, you are a clear team player and the team trusts you and has built a great rapport with you. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| You are a **clear and candid communicator**. Internally, you stay in touch with the team, you give everyone clear context and updates on what you are doing and working on and you engage with the team in a thoughtful way. Any clients, vendors, partners or external people that you connect with feels taken care of, listened to, responded to and clearly communicated with. You are consistently painting a vision for your work internally and externally and are a great listener and communicator so that all involved feels connected to you and your work. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Responsibility.** Your job is growing. You are taking full responsibility for your part of the business. Your manager has less on his/her plate because of you taking on more. You take ownership of the wins and struggles you are a part of. No one else has to worry about your part of the business because you are so fully in charge of it. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| You stay focused on **Results.**  Every day, all day long you think about your goals, your team goals and the company’s overall goals. And you use the time and money Silver Lining spends on you to get results. You can look at all of the time you spend and honestly think that it has been spent well and that you have generated results for the company. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Big Picture Thinking** is natural to you. You can have a big conversation about how to get to 500 clients as easily as you can about how to solve an individual client issue. You are always thinking of ideas to help us get to the next level. Silver Lining has a bigger / brighter future because of your ideas and thinking about growth. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Implementation / Project Management** is always safe in your hands. You hit deadlines, you get the results for the projects/parts of the business that you are working on, you figure out the details, you manage the vendors, you build strong relationships, you bring things to life. Ideas turn into reality with you. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Trust** has been built between you, your manager and the team. The longer you are at Silver Lining, the more responsibility you have, the more impact you are creating, the more of a trusted partner you are to your manager and your team and the company as a whole. | **LOW**  **AVG**  **HIGH** | **HIGH** |  |
| **Orientation towards growth** is natural and you are developing yourself at Silver Lining and outside of work. You are constantly striving to be a better person, a better performer and a better contributor at Silver Lining. You being a better you is paying off for YOU (most important!) and Silver Lining is winning as a result! | **LOW**  **AVG**  **HIGH** | **N.A** |  |

**TEAM CHEAT SHEET NON NEGOTIABLES ASSESSMENT**

|  |  |  |  |
| --- | --- | --- | --- |
| **Team Non Negotiables** | **Current** | **Min Goal** | **Specific Feedback** |
| You **Attend all Team Meetings** - you show up on time, are fully prepared, fully engaged and respect your own and your fellow team members’ time.. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Daily Update of Ticket & Deals / Deliverables** you take very seriously your responsibility and every single day every single Deliverable and/or Deal/Ticket that you are responsible for is worked on and updated. | **LOW**  **AVG**  **HIGH** | **HIGH** |  |
| **Strong P&R and Calendar / Time Management**  you submit your P&R daily/weekly as per standard and you don’t just submit it - you actually use it as a helpful tool to reflect on your own performance and keep getting better. You use your calendar in the same way and you are strategic about your time and priorities. You use your P&R and calendar as an incredibly clear and easy way to manage up and out. | **LOW**  **AVG**  **HIGH** | **NA** |  |
| **Roles/Goas, 360s and Strategic Reflection** you take advantage of the company’s major investment into strategic team initiatives and you participate fully, are always engaged and use the process to help your teammates and yourself always get better. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Book A Zoom Room** you know how to book a Zoom Room and there is literally zero conflicts or issues EVER with Zoom Rooms while on your watch. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| Your **Calendar Invites** are symbolic of your professionalism and ability to manage up, down and out. Every calendar invite follows standard process, has the right subject line, attendees, location and a smart /strong agenda that will allow for all who are attending to not only show up but be fully briefed and ready to maximize productivity. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Use Podio**  - you manage yourself and your work well in Podio. You are fully connected to the team, present and online during working hours and the fact that Podio is so transparent is working to your advantage - not to your detriment! | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Manage a Deliverable** you project manage with excellence and diligence. All of your Deliverables are fully organized, have Milestone 1, 2, 3 and 4 outlined, have a solid due date, all the right tasks outlines and are constantly being updated based on progress. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Manage Deals & Tickets in Agile** every single Deal and every single Ticket that you own are followed up with daily. You have every Deal and Ticket labelled properly and are using all of the right standard processes around due dates, tasks, labels, tags, etc. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **If/Then** when you receive a request or information comes your way that is not yours to handle you 100% of the time follow the if/then rules to send the right information to the right person at the right time in the right way. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Responsible Time Away** You take the right amount of Time Away, you plan in advance, you talk to your Manager, you get approval, you ensure the job you have and the responsibilities that you own will not be compromised when you are away and you communicate well with all involved to manage your Time Away. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Fully Engaged Team** You show up every work as a fully engaged team player. You say hi and goodbye. You give silver stars! You update the Wiki with great team ideas, you make some jokes and have fun with your teammates. You are a contributor to our culture! | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Professional Development Activity** you take advantage of any/all of the ways that we work to help you continue to grow professionally. You are always active at Team Time, you take advantage of the Book Club, you let us know when you are struggling with a specific skill so that we can get you the training or support you need to succeed! | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Personal** you focus on your own wellness so that you bring a happy and whole person to work each day! You take advantage of MMM and other initiatives we put into place to help you succeed and you take responsibility for your own personal factors that lead to your performance. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Conflict Management** you help us understand if something is going wrong and you talk to the right people at the right time in the right way to resolve any issues that you are facing while at Silver Lining. | **LOW**  **AVG**  **HIGH** | **N.A** |  |
| **Career Advancement** you have big aspirations and you tell us what they are so that we can help you thrive and succeed! You don’t just do your job - you overperform - and we can see it! | **LOW**  **AVG**  **HIGH** | **N.A** |  |

**AGREED ON ACTION ITEMS & TIMELINES TO CORRECT PERFORMANCE ISSUES**

* **DATE** ACTION ITEM - xx
* **DATE** ACTION ITEM - xx
* **DATE** ACTION ITEM - xx

**NEXT STEPS**

* **3 Way Alignment on Action Items and Timelines** 
  + We will not leave this meeting or conclude this moment in the process until all 3 people present at this meeting agree on reasonable and acceptable Action Items and Timelines for Performance Improvement.
* **Email Confirmation of Verbal Warning** 
  + The finalized Action Items and Timelines will be updated in this document and a PDF will be emailed to you for your reference. Once you receive it you simply have to email back to confirm receipt.
* **People Team Follow Up on Agreed Upon Deadlines** 
  + The People Team will follow up with you to ensure you receive any follow up and support we committed to you as well as to ensure that you have done everything you said you will by the time you said you would
    - In the event that you do all agreed Action Items by the agreed Deadline it will signal the completion of this process and your Team Status will go back to good standing
    - In the event that you do not do all of the agreed upon Action Items by the agreed Deadline it will signal that we have more significant and ongoing Performance Issues and you will be issued Written Warning 1